

Job type:

Financial Planning Internship

Position Description:

Assist paraplanners and staff financial advisors in preparing deliverables for client meetings by using portfolio management software. Gain invaluable knowledge and exposure to the financial planning industry by working alongside experienced advisors.

Responsibilities:*Generate Client Deliverables*

Work with associates to create reports and materials used in client meetings. Generate and analyze client performance, gain/loss, current position, and Morningstar Investment reports.

Investment and Industry Research

Complete research projects on various topics in the financial planning industry and evaluate industry trends.

*General Office Duties***Qualifications:***Education*

- Currently enrolled sophomore, junior, or senior in college or recent college graduate
- GPA 3.0 or higher
- Majoring in finance, economics, math, Consumer and Family Financial Services, or accounting

Computer Skills

- Superior understanding of Microsoft Office Suite
- Software knowledge in addition to Microsoft Office a plus

Terms:

Internships are typically 14 weeks in length and pay \$15 per hour. Due to the sensitivity of all client information, Summit will perform background and credit checks on all candidates. Candidates will be asked to sign a confidentiality agreement.

Contact Information:

Please submit resumes and cover letters to internship@summitfin.com